

A personal approach to giving



DONOR ADVISED FUND

Creating a Donor Advised Fund allows you to make a gift to your community foundation, then remain actively involved in suggesting uses for your gift.

How it works

- You make a gift to your community foundation – you can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honour of any person or organization you choose.
- You receive tax benefit in the year your gift is made.
- You recommend uses for the fund – working with our professional program staff to support the causes and organizations you care about most.
- Your recommendations are presented to our community foundation board for approval.
- We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously).
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift – and all future earnings from your gift – is a permanent source of community capital, helping to do good work forever.

A personal connection

When Alex Dorado retired, he wanted a way to give more to his community. “I’ve lived here my whole life, and now that I have more time and resources, I can give back to a number of causes and organizations that are very special to me,” he says. Alex and his financial advisor met with their community foundation to discuss ways Alex might increase the impact of his giving and gain maximum tax advantage. Alex chose to establish a Donor Advised Fund in his family’s name. He now meets with the community foundation’s professional program staff to recommend grants in the areas he cares about most. “Last year, based on my recommendations, the fund bought uniforms for an afterschool sports league and supported an adult literacy program,” reports Alex. “This is a great way to stay involved and use what I have to make a difference in the community I love.”

Visit our website for more information

www.caledoniafoundation.ca





Donor Advised Fund

Ten reasons people choose community foundations.

one

We are a **local organization** with deep roots in the community, and part of a nationwide movement whose support we build and share.

two

We bring donors to the table as **community builders**, working closely with them to align their philanthropic vision with the community's needs.

three

We identify **long-term needs** and opportunities and invest in solutions that let our communities guide their own future.

four

We take a broad and inclusive view of what a community is, and **provide grants** to the widest possible range of organizations and initiatives.

five

We provide highly **personal and flexible service**, accepting a wide variety of assets and offering donors maximum tax advantage.

six

We build **permanent funds** and those that can respond to immediate needs, helping our communities ensure vital futures.

seven

We **multiply the impact** of gift dollars by pooling them with other gifts.

eight

We believe that diversity is strength, so we **bring the entire community together** to stimulate new ideas, build participation and strengthen community philanthropy.

nine

We are **transparent and reputable stewards** of community resources, committed to being accountable, accessible and responsive.

ten

We build **community vitality** – the unique and essential spirit that flourishes when people believe their community holds possibilities for everyone.

More benefits

Donor Advised Funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grants made possible by their gifts. If you have a range of community interests, a Donor Advised Fund may be the ideal vehicle for fulfilling your charitable wishes. They are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

Your gift can be combined with others to increase its impact, and you can add to the fund you establish at any time, receiving tax benefit with each new gift. You can establish a fund today and make grant recommendations now or in the future. And if you endow your gift, it becomes a permanent resource for the community.



Community means so many things to so many people and the world to us. In all we do, and all we say, we are all for community.

We are part of Canada's community foundation movement, represented by more than 160 community foundations from coast to coast.

Community vitality has been our purpose, promise and passion since 1921, when we began connecting donors to community needs and opportunities.

Together, we help Canadians invest in building strong and resilient places to live, work and play.